



University of
Zurich^{UZH}



EuropaInstitut

AN DER UNIVERSITÄT ZÜRICH
GEGRÜNDET 1992

Continuing Education

Certificate of Advanced Studies

Family Governance & Family Office Excellence

2027



CAS FAMILY GOVERNANCE & FAMILY OFFICE EXCELLENCE (15 ECTS)

The program is designed for professionals, executives, and family members of family businesses and wealthy families. This part-time university program aims to provide an in-depth understanding of the four key governance areas relevant to family enterprises and wealthy families: Family, Ownership, Business, and Wealth Governance. Core topics include: family constitution, ownership strategy, ownership structures, legal frameworks and succession planning (shareholders agreement, inheritance contracts), family dynamics, communication, taxes, board of directors, leadership succession, business evaluation, exit (IPO, sale), wealth organization (family offices), real estate, philanthropy and art.

MODULE 1

Family Governance – Family & Ownership,
Family Constitution, and Strategy

- Ownership and family strategies
 - Family constitutions
 - Conflict resolution and communication processes
 - Various legal structures
 - Family dynamics
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MODULE 2

Specific Business Topics

- Family business governance
 - Corporate strategy
 - Compensation systems
 - Shareholder agreements
 - Leadership and succession
 - Internal and external (crisis) communications
 - Exit/IPO strategies
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MODULE 3

Family Office Excellence

- Family wealth governance
- Asset strategy and allocation
- Asset allocation
- Collaboration and task distribution between banks, family offices, and families
- Philanthropy and sustainable finance
- Diverse asset classes

Target Audience

The CAS is aimed at individuals working with family firms and high-net-worth families in governance-related areas – including banking, family offices, wealth management, fiduciary services, and legal advisory – who wish to deepen their expertise and stay abreast of current developments. It is also suited for professionals seeking specialization in this field with foundational knowledge, as well as family members actively involved in governance.

Language
English

Application Deadline
30 June 2027

Duration
Mid-September to early February
Friday afternoons and Saturday mornings

Tuition Fee
CHF 9,800.- incl. digital study material,
examination fees and graduation ceremony

Information
Europa Institut at the University of Zurich
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* The course will only be held if there is a sufficient number of participants.

This program is organized and run by Europa Institut at the University of Zurich on behalf of the Faculty of Law of the University of Zurich.